Overview

This document is meant to guide users in the various actions that they need to take to create and manage quotes.

Quotes are specific products that don't have a price already listed on the marketplace, one cannot directly purchase these products and to be able to, one must first open a request and undergo a negotiation phase.

Lifecycle of a quote

Browse a product offering on the marketplace, click on the button "Request a Quote", fill in the text box and press send, this creates a Quote request.
The quote is then visible in the Quote Dashboard from both the customer and the provider side.
At this point, the only other action that a customer can take on it, is to set a Request Date, a date in which he wants the provider to provide him either the product, or an update at best.
Then the Provider may accept/approve the quote, meaning that he accept the request from the customer and he will work on it.
The provider can then set up an Expected Date, which is the date he expect to be able to provide the product.
Both Request Date and Expected Date gets periodically checked, if the quote goes over the time limit, it gets automatically cancelled.
In the case that both date are present, only the Expected Date gets taken into consideration.

At this point the provider can upload a document with the formalized proposal in PDF.
After it gets uploaded both parties are able to download the document.

Then the last step is for the customer to accept the quote with the proposal.
This concludes the Quote system funcitonality.

At this point the provider can create a tailored Product, that is visible only by the customer, so that the customer is able to put it into the cart and purchase it

Chat

At any point once the quote is created, both the customer and provider can send messages to discuss any topic needed.
This chat is tied to the quote and is accessible from the quote inside the dashboard

Deleting a quote

At any moment during the negotiation, both parties are able to press a button to cancel a Quote, for example because the provider doesen't want to commit to the request or maybe because the customer doesen't like the proposal and want to interrupt negotiation.
Deleting a quote makes any action on it disabled, but it won't get deleted from the list

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